



Individual Tax Questionnaire

1. Are you a new client with us this year?
2. If so, please list your current address.
3. If you are an existing client, did your address change in the last year?
4. Did your marital status change before the end of last year?
5. Were there any changes in dependents? New dependents or no longer filing for a dependent?
6. Did you earn overtime pay in 2025? (If so, please provide approximate overtime wages – eligible for new 2025 federal exclusion.)
7. Did you earn tips in 2025? (If yes, approximate total tips – may qualify for new federal 'no-tax on tips' exclusion.)
8. Did you have any self-employment, side gig, or freelance income?
9. Did you receive any 1099-K, 1099-NEC, or 1099-MISC forms?
10. Did you expect to receive any K-1s from a business, partnership, trust, or estate?
11. Did you buy or sell cryptocurrencies, stocks, mutual funds, bonds, or other investment properties?
12. Did you own or trade ANY digital assets or cryptocurrencies at ANYTIME during 2025?
13. Did you receive any digital asset 1099-DA forms?
14. Did you make a contribution to a retirement plan in 2025? (401(k), IRA, etc.)

15. Did you make contributions to a Health Savings Account (HSA)?
16. Did you receive any HAS distributions?
17. Did you make contributions to a 529 college savings plan?
18. Did you buy, sell, or refinance any properties in 2025?
19. Did you make any energy-saving improvements to your home (solar panels, insulation, efficient windows, HVAC, etc.)?
20. Did you purchase an electric vehicle or plug-in hybrid in 2025?
21. Did you or your dependents incur any tuition or continuing education expenses?
(Form 1098-T)
22. Did you or any dependents pay student loan interest in 2025? (Form 1098-E)
23. Did you **donate** money, clothing, cars, crypto, or stock in 2025?
24. Did you **donate** to any qualifying scholarship-granting organization or education credit program (Section 25F charitable credit)?
25. Did you or any of your dependents have health care coverage THROUGH THE MARKETPLACE in 2025? (Form 1095-A)
26. Did you make any estimated tax payments in 2025? If so, please list the amount.
27. Did you or any dependents have an Identity Protection PIN with the IRS? If yes, please upload or send us the IRS letter.
28. For direct deposit, please provide your bank name, routing number, account number, and indicate if it is checking or savings.
29. Please list any questions, concerns, or major life changes that may affect your taxes (e.g. marriage, job change, inheritance, lawsuit, large purchases, etc.)
30. Do you want to electronically file your tax return?